

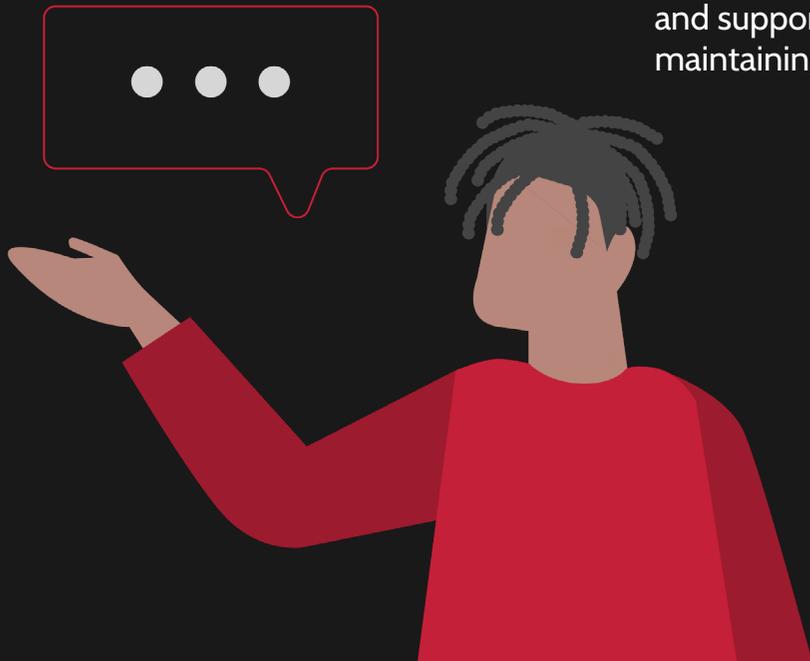
# PeopleSoft Optimization

Maintaining the value of your PeopleSoft investment doesn't stop with your 9.2 upgrade. Continued optimization efforts will help ensure you are leveraging the latest functionality, regularly applying PUM images, and have a roadmap for the continued success of your PeopleSoft application. But what options are available, and what types of initiatives should you consider? In this eBook, we'll outline the different avenues for optimization your organization might consider, and tangible next steps to build a roadmap for your PeopleSoft application.

## Why Would You Optimize?

It may seem simple, but the work is not done once you upgrade. PeopleSoft 9.2 offers a wealth of new utilities and tools that allow for the continued extension of your PeopleSoft application, while delivering a massive amount of new features and functionality to replace previously customized requirements. If you are live on 9.2 but not doing regular updates – you are not getting the most value from your PeopleSoft application.

Optimization can take many different approaches – whether it is a part of a regular PUM update, during the implementation of a new module, or as standalone initiative to deliver new features or resolve a pain point. The underlying goal remains the same regardless of the type of optimization you pursue. The continued review, analysis, and optimization of your PeopleSoft System will lead to increases in automation, higher ROI, lower total cost of ownership by leveraging new delivered features, and a reduction in maintenance and support costs associated with maintaining out of date systems.



# What are the different types of optimization?

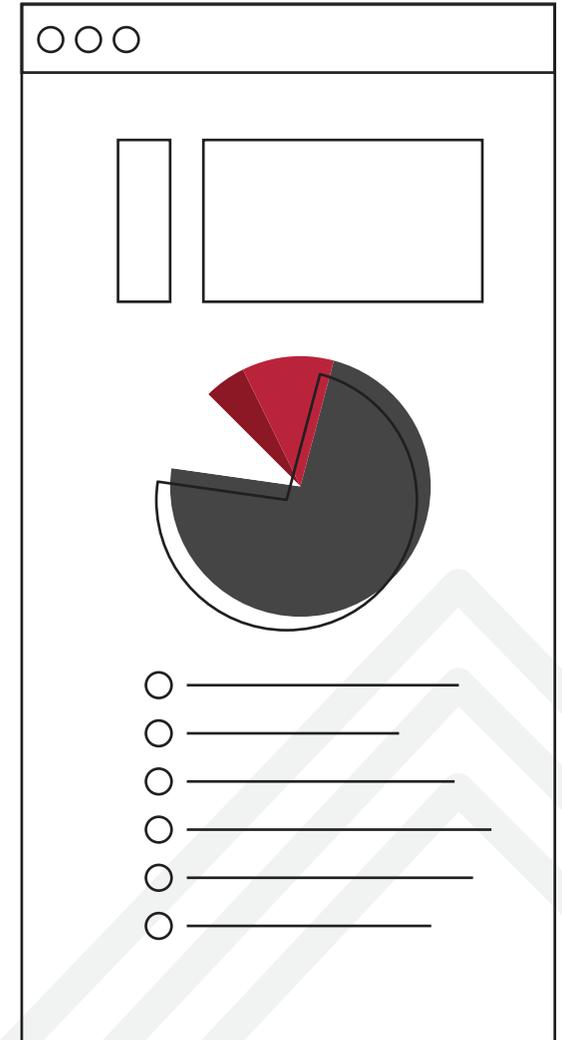
## *EVALUATING NEW FEATURES WITH PUM UPDATES*

Prior to PUM upgrades, any break-fix initiatives or regulatory changes had to be applied in the form of a traditional application upgrade. This was a timely and costly process, and swayed organizations away from improving the functionality of their PeopleSoft environments. This typically resulted in outdated PeopleSoft interfaces and hindered system performance.

Fortunately, with a PeopleSoft PUM upgrade, organizations can leverage the reduced time, effort, and costs associated with traditional upgrades to ensure that their unique business needs are being met. A main benefit of PUM involves the selective adoption capabilities that allow PeopleSoft users to personalize which features they would like to implement.

If you choose to download a PUM Image Update that has recently been released, you have the opportunity to select the specific skills you want to incorporate into your PeopleSoft environment. Organizations no longer must commit to a timely and costly traditional upgrade process to see improvements and more value-driving features to their PeopleSoft applications.

PUM also provides continuous image updates and scheduled releases so you can consistently optimize your PeopleSoft environment. Oracle now releases these image updates 3 times per year.



# What are the different types of optimization?

## *EVALUATING NEW FEATURES WITH PUM UPDATES CONT.*

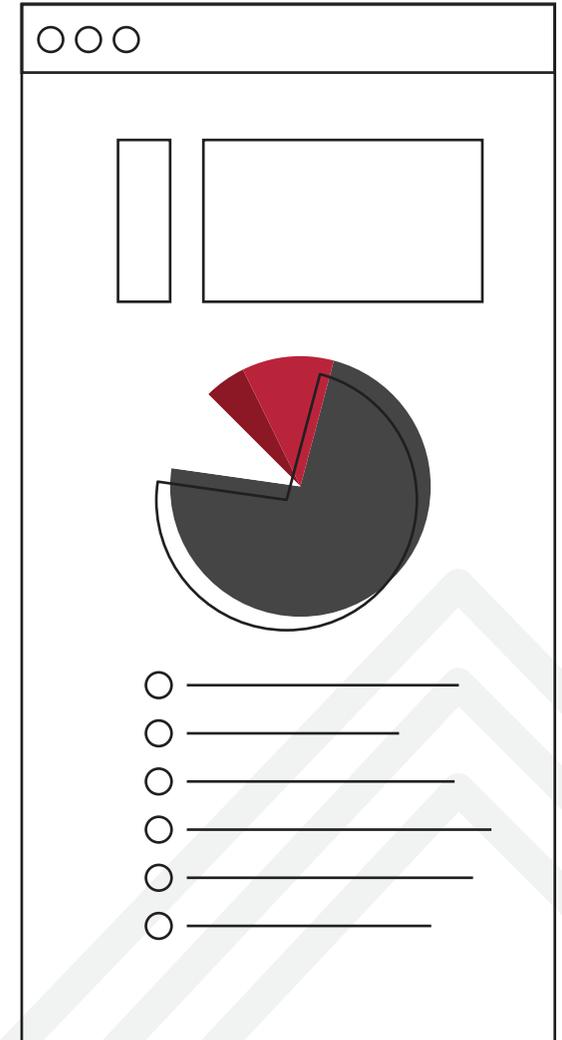
Along with PUM Updates, it is important to keep your PeopleTools up to date. PeopleTools are a toolset that supports the development and optimization of PeopleSoft applications. The product suite includes over 40 technology tools grouped into 5 functional areas: development, analytics, integration, administration, and lifecycle management tools. A PeopleTools update differs from PUM in that it is more specific to technical functions and impacts functional capabilities.

Oracle releases PeopleTools updates that build on PeopleTools functionality to drive and extend the value of applications. Not only do PeopleTools upgrades bring new PeopleTools capabilities and functionality, but they also decrease operational costs and organizations who take advantage of PeopleTools upgrades see an increase in user productivity.

The results of a PeopleTools update provide various enhancements to your PeopleSoft environment. Organizations who take on a PeopleTools update can expect to see an optimized user interface, a more advanced analytic platform that includes Kibana integration, pivot grid features, and external data integration, and a reduction in overall operational costs.

PeopleTools updates typically release between ranges of 12-18 months.

[Learn more about PUM and PeopleTools Updates on our blog](#)



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## *NEW MODULE IMPLEMENTATIONS & UNUSED FUNCTIONALITY*

Where it makes sense, there may be a business case to implement new PeopleSoft modules that are not currently a part of your footprint. Oracle's continuous improvement of functions/features within critical modules allows for a renewed evaluation of usage within your licensed product/module suite. Where you are heavily invested in PeopleSoft and not looking to make a move or transformation in the near future, adding new PeopleSoft modules that extend the enterprise connectivity and automation available, as well as remove 3rd party or manual processes will allow for greater efficiencies to be realized from your PS application. As a part of your continued innovation and transformation, replacing home-grown, or point solutions with modules that have delivered integrations will reduce the maintenance and support costs, as well as increase reporting capabilities and cross-functional visibility and coordination.

Many active PeopleSoft users are also still not utilizing the wealth of delivered functionality available with each PUM image. When evaluating unused functionality, new feature items that may have improved (or have been recently released) become part of a "pool of candidates" that oftentimes require our SME's to demonstrate to evaluate their potential. From that point, a decision about new features and delivered functionality versus current state solutions) is made and may contain some high-level ROI to support the future state recommendation. The ROI would factor the "removal of maintenance" associated with maintaining a customization vs. replacing with delivered capability.

# What are the different types of optimization?

## ACCOUNTS PAYABLE AUTOMATION

Many organizations are stuck spending too much time on data entry and not enough time on analysis and consideration of trends and patterns within their accounts payable processing. CFOs and treasury teams lack key visibility into the end-to-end process, from receiving to paying invoices. This lack of insight often leads to accruing late fees and missing out on early pay discounts because they don't process and/or approve their invoices fast enough. Ultimately, organizations find themselves operating with separate, unintegrated systems that are all trying to capture images of their invoices, which can lead to countless errors and time wasted.

AP Automation software will grant organizations access to accurate and reliable information regarding the status of their invoices by using an end-to-end audit trail. It helps to enforce control policies and has built-in fraud detection capabilities from business rules and artificial intelligence.

A key benefit of automation is the overall increase in control and transparency while reducing tedious manual tasks. It helps to improve invoice processing speed and accuracy, reduce errors, as well as any associated error costs from rectification. AP Automation offers a solution for growth, eliminating the need for templates and allowing for customizable business processes and a flexible workflow.

Accounts Payable processing is intricate and complex, but by automating it through the best fit software, organizations can start to narrow this broad scope and take control.



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## *CUSTOMIZATION REMOVAL/RE-ENGINEERING*

Continuing on the theme of unused functionality is every PeopleSoft customers favorite word – customization. While PeopleSoft historically offered powerful tools to extend, expand, and customize the application to meet business needs – the continued evolution of ERPs and reduction of support staff now favors a “delivered” model in order to gain the most value out of your application.

Categorizing and understanding your current state capabilities can be difficult, especially with decades of customizations, staff turnover, and lack of documentation to detail the existing customizations in your environment.

It's recommended to take stock of your current customization footprint – whether that is internal or with a third party tool (Elire's proprietary Customization Identification Tools has a demo available here) - in order to better understand the present and future state justification for existing customizations, as well as their cost of maintenance and the availability of new delivered functionality.

**PeopleSoft Upgrade  
Accelerator Tools Demo**

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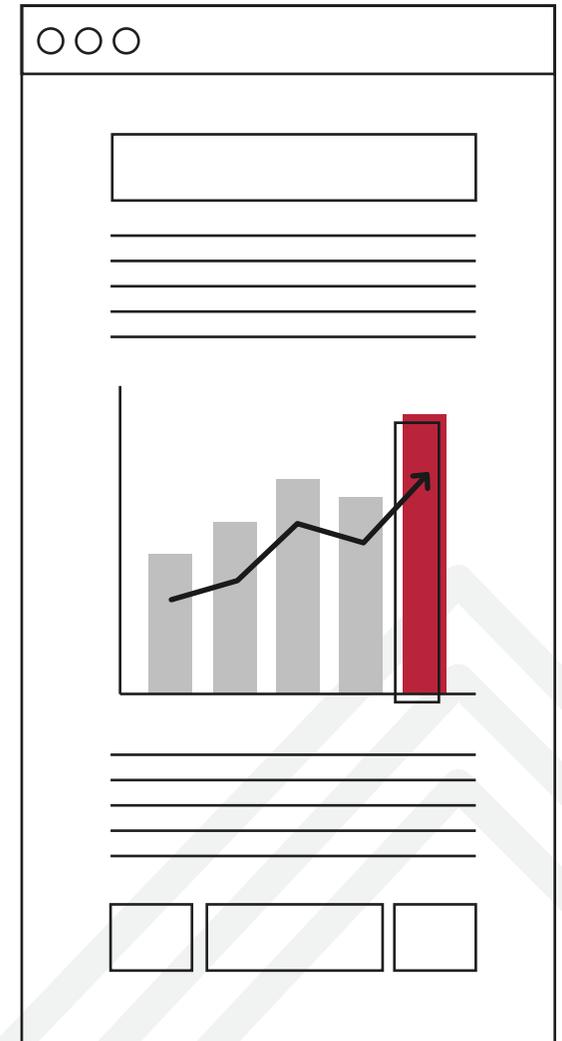
## PROCESS REDESIGN

Business Process Optimization is an approach to resolving problems within core business functions. The application of Business Process Optimization increases organizational efficiency by removing obstacles and initiating a business process redesign and falls under the discipline of Business Process Management (BPM). Optimization within business functions leads to greater return on strategic goals, while eliminating redundancy, improving communication, and streamlining workflow.

No matter your industry or core business, a business process transformation can be effectively applied to sales, accounting, operations, and procurement business areas. Business Process Optimization is a

structured way to compile and examine your corporate processes and identify what works well and what does not. The approach initiates concrete steps to fix problems, and leads to improved efficiency, productivity, and satisfaction. Below, we'll discuss business process redesign methodology and the steps you should take when reengineering your existing processes.

### Business Process Optimization Steps



# What are the different types of optimization?

## TRAINING

Staying up to speed with upgrades and enhancements to your applications can give your organization the opportunity to leverage new functionality, which can ultimately improve productivity and efficiency for your business processes. But, doing so means that your users will have to adapt to changes that the new upgrades or enhancements bring to your current processes. Managing this change can be difficult, so ensuring that users have access to effective training to assist them is vital. Oracle Guided Learning (OGL) helps ensure that your training is consistently updated and optimized for your users, and ultimately helps accelerate your implementation while allowing you to keep up with any updates and releases.

Oracle Guided Learning (OGL) is a cloud platform that provides guidance to ease and accelerate the adoption of your web-based applications. Initially developed as support for Oracle SaaS applications, OGL now replaces the User Productivity Kit (UPK) and supports your PeopleSoft training with personalized training content that can be accessed at the point of need.

When business processes change, employees are faced with learning curves that may impact productivity. Oracle Guided Learning ensures that your employees are educated and able to complete any task, on any application or software.

# What are the different types of optimization?

## *TRAINING CONT.*

By providing step-by-step direction and custom learning content, your employees can better adjust to changes and adapt to new intended business processes with the help of personalized and configured assistance. The guided learning support ensures that your employees can be productive in a new environment from day one.

Companies looking to reduce support tickets, streamline adaptability, and improve the employee user experience will see value in OGL and its ability to improve productivity of processes.

For PeopleSoft applications, OGL can be used to build guided processes for tasks, which can be accessed at the time they're needed. As users enter transactions into the system, OGL will guide them through, step-by-step, until they've completed the task. OGL can greatly reduce the need to seek help desk assistance that could delay productivity. Not only can users become more productive, but HR teams can see a reduction in the number of support calls, allowing them to focus their time on more strategic tasks.

**Oracle Guided Learning**

## WHAT IS NEXT? HOW TO GET GOING

The roadmap for optimization looks different for each organization, but there are many options available to get more value out of your PeopleSoft Application, while simultaneously preparing your People, Processes, and Systems for future transformations. Leveraging a partner like Elire to assess, categorize, and prioritize your optimization initiatives will provide a roadmap for the future – and continue to derive operational and financial value on your PeopleSoft investment.

  
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## CONTACT

For more information on PeopleSoft Optimization, contact [PeopleSoft@elire.com](mailto:PeopleSoft@elire.com) or visit our website – [elire.com/services/peoplesoft-services](http://elire.com/services/peoplesoft-services).

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Mr. Martiny serves as Elire's PeopleSoft Practice Lead and has over 20 years of PeopleSoft experience. Mr. Martiny leads the OHUG PeopleSoft User Group and is a recognized leader in the PeopleSoft space.

## ABOUT ELIRE

Established in 2005, Elire's eighteen years of experience is focused on five main product areas: Oracle Cloud, PeopleSoft, Treasury, Advisory Services, and Managed Services. Elire's mission is to be a Trusted Advisor for their clients, specializing in transforming clients from PeopleSoft to Oracle Cloud. Elire fulfills this promise by efficiently implementing, integrating, upgrading, and optimizing client software investments and business processes.

Elire is uniquely positioned in the marketplace as the only PeopleSoft and Cloud partner with both active practices, proven methodologies, and proprietary transformation accelerators including PeopleSoft to Cloud Data Conversion Accelerator and PS to Cloud DataSync for co-existence. Elire's 300+ clients span the public and private sectors, including niche expertise in Financial Services, Utilities, Government Laboratories, Healthcare, Education, and Professional Services.

## INDUSTRY INSIGHTS

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